

The Economic Impact of Expenditures By Travelers On Minnesota's Northeast Region and The Profile of Travelers

June 2007 – May 2008

Prepared for:

Explore Minnesota Tourism
State of Minnesota



UNIVERSITY OF MINNESOTA



and

Minnesota Arrowhead Association

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1.0 Introduction

This is the second report of the Economic Impact of Traveler Expenditures on the Northeast Region prepared by *Davidson-Peterson Associates*. The research approach employed is designed to capture economic impact data (i.e., economic impact of traveler expenditures on the state of Minnesota) and traveler profile data concurrently. This report covers traveler expenditures made in the Northeast Region during the 12-month period from June 2007 through May 2008. A similar 12-month study was conducted for same period in 2005-2006.

The primary purpose of this study is to measure the economic benefits the Northeast Region residents and governments derive from the dollars spent by travelers in the region.

These economic benefits include:

- **Total expenditures** made by travelers;
- Number of **full-time equivalent jobs** supported by these expenditures;
- **Wages, salaries and proprietary income** earned by area residents as a result of these expenditures; and
- **State and local government revenues** generated by traveler expenditures.

The economic impact estimates in this report may be used to document the importance of tourism as a key segment of the Northeast Region's economy; to underscore the need to continue to support the expenditure of time, effort and dollars to promote tourism growth; and to track the results of the Northeast Region's tourism marketing efforts.

In addition, the traveler on-site interviews used in the economic impact analysis are presented as a traveler profile in Section 7.0 of this report. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period.

Please refer to Appendix A for a description of the procedures used in executing this study and for definitions of the terms used.

2.0 Executive Summary

2.1 Introduction

Davidson-Peterson Associates was hired to conduct a year-long study which was a joint project with Explore Minnesota Tourism, the University of Minnesota Tourism Center* and the Minnesota Arrowhead, Minnesota Heartland and Southern Minnesota Tourism associations and the Metro Tourism Committee. Davidson-Peterson Associates was commissioned to conduct a “bottom up” analysis of traveler expenditures in Minnesota and their impact on the economy of the state during the period June 2007 through May 2008. (See Appendix A, Sections A through C for details on the “bottom-up” approach.)

The economic impact analysis for June 2007 through May 2008 is based on the following surveys:

- Telephone interviews were conducted with a random sample of accommodations managers in the Northeast Region upon conclusion of each season. A total of 2,044 interviews were completed statewide, 718 of which were completed in this region, including a census of the Duluth area for a special study.
- Self-administered questionnaires were completed by 2,023 Minnesota travelers statewide who were either staying overnight or had traveled at least 50 miles from home on a day trip. These questionnaires were completed during each of the four seasons and in each of the four regions. Please refer to Appendix A: Procedures (Section D.5) for more detailed information on the sampling approach by region.
- A total of 1,000 telephone interviews were conducted with a probability sample of Minnesota households equally divided among the four seasons.

Total estimated traveler expenditures by category of expense were provided to Dr. William Shaffer of Georgia Tech to develop an input-output model based on the Northeast Region’s economy. The input-

* The University of Minnesota Tourism Center is a collaboration of the College of Food, Agricultural and Natural Resource Sciences and the University of Minnesota Extension Service.

output model estimated the number of full-time equivalent jobs, wages/salaries/proprietary income, and state and local government revenues supported by traveler expenditures.

Additionally, Davidson-Peterson Associates used the self-administered questionnaires conducted among Minnesota travelers in the Northeast Region to provide a traveler profile for that region. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

In total, 999 interviews were conducted in the Northeast Region during the two study periods combined. Using the findings from the state economic impact study, the sample was balanced across *regions* and *seasons*. The Northeast Region traveler profile results are based on a weighted sample of 655. (See Appendix A, Section F for details on weighting procedures.)

2.2 The Findings

In total, travelers in the Northeast Region spent \$1.601 billion in the region. Over one-third of the region's traveler expenditures were spent by travelers staying overnight in hotels/motels/B&Bs. Almost half of total traveler expenditures were also spent in the summer season.

The \$1.601 billion spent in the Northeast Region from June 2007 through May 2008 supported 33,500 full-time-equivalent jobs, \$668.4 million in resident income (wages, salaries and proprietary income), \$194.8 million in state government revenues and \$59.8 million in local government revenues.

The Northeast Region received 5.76 million person-visits during the period of June 2007 through May 2008. Some 1.31 million person-visits were by travelers on day trips and the balance were made by travelers staying overnight in the Northeast Region (4.45 million). Nearly one-third of all visits were by travelers staying in hotels/motels/B&Bs (31%) with one in four staying with friends and relatives (26%). Campgrounds (9%) and resorts (12%) accommodated the balance.

Some 213 hotels/motels/B&Bs with 8,149 rooms offered 2.56 million room-nights and sold 1.53 million to guests staying fewer than 30 nights during the period of June 2007 through May 2008. As noted, travelers staying in these rooms made the largest contribution to the traveler expenditures in the Northeast Region.

A total of 300 resorts with 4,094 units made 1.2 million unitnights available and sold 0.62 million of them to guests staying fewer than 30 nights during the 12-month period.

A total of 164 campgrounds on both public and private lands with 6,498 sites, made those sites available for 1.25 million site-nights and sold 0.45 million to guests staying fewer than 30 nights.

Those numbers led to occupancy rates of 60% for hotels/motels, 52% for resorts and 36% for campgrounds.

According to managers' estimates, three in four guests who stayed in the Northeast Region properties were Minnesota residents – 70% in hotels/motels/B&Bs; 69% in campgrounds and 76% in resorts.

Managers estimated that hotel/motel/B&B guests came on average in parties of two and stayed two nights; resort guests came in parties of three or four and stayed three nights, and campers came in parties of two or three and stayed two nights.

The table on the following page summarizes the industry highlights for the period June 2007 through May 2008.

2.3 The Northeast Region Lodging and Campground Industry Highlights

Table 2.3

The Northeast Region Lodging and Campground Industry Highlights

June 2007 - May 2008

	<u>Hotels/Motels/ B&Bs</u>	<u>Resorts</u>	<u>Campgrounds</u>
Number of properties	213	300	164
Number of rooms/units/sites	8,149	4,094	6,498
Total available room-nights/unit-nights/site-nights (millions)	2.56	1.2	1.25
Total occupied room-nights/unit nights/ site-nights (millions)	1.53	0.62	0.45
Average occupancy rate	60%	52%	36%
Average daily room rate	\$78.92	--	--
Average unit rate	--	\$157.77	--
Average site rate	--	--	\$20.71
MANAGEMENTS' ESTIMATES:			
Average party size	1.86	3.53	2.58
Average length of stay	1.84	3.01	2.22
Guest Origin			
<u>Out of State</u>	<u>30%</u>	<u>24%</u>	<u>31%</u>
U.S.	20%	18%	21%
Canada	9%	5%	10%
Other foreign	1%	1%	*
Minnesota	70%	76%	69%
Trip Purpose¹			
Pleasure	57%	94%	N/A
Business	26%	3%	N/A
Meeting/convention	17%	4%	N/A

Note: Length of stay as noted throughout this document represents the average number of nights spent in a single property. It does not necessarily reflect the total number of nights spent in Minnesota. Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

¹ These statistics not collected for campers

3.0 Estimates of Traveler Expenditures in Minnesota

3.1 Summary

Travelers to the Northeast Region during the period of June 2007 through May 2008 spent **\$1.601 billion** in the region:

- Over one-third of those dollars were spent by travelers staying at hotels/motels/B&Bs;
- Food, shopping and recreation account for three quarters of all the dollars spent by travelers; and
- Almost half the dollars were spent during the summer.

3.2 Overall Expenditures

The Northeast Region travelers spent an estimated total of **\$1.601 billion** in the period June 2007 through May 2008.

3.3 Estimated Traveler Expenditures By Accommodation Type

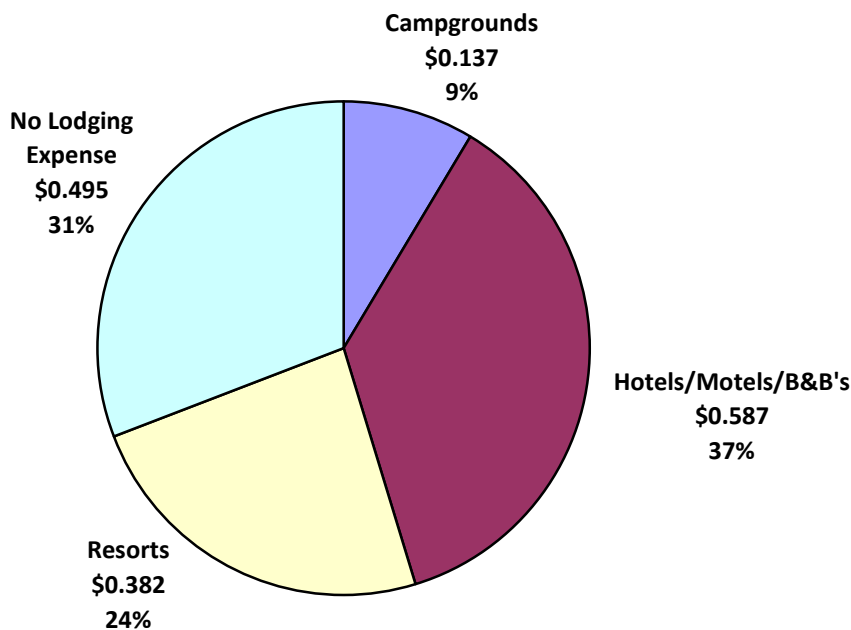
More than one-third of the total estimated traveler expenditures, \$587.2 million (37%), were spent by travelers staying overnight in the Northeast Region at hotels/motels/B&Bs.

Those staying in resorts in the Northeast Region spent \$382.1 million (24%), and those camping spent \$136.7 million (9%).

Travelers with no lodging expenses (i.e., those staying at homes of family/friends or daytrippers) spent \$495.5 million, or 31% of the Northeast Region's traveler expenditures.

- Travelers who stayed at the homes of family and/or friends spent \$453.81 million (28%) while visiting the Northeast Region.
- Those visiting just for the day or passing through the Northeast Region spent \$41.64 million (3%).

Figure 3.3
Estimated Northeast Region Traveler Expenditures
By Accommodation Type
June 2007 – May 2008
(\$ Billions)



Total: \$1.601 Billion

3.4 Estimated Traveler Expenditures By Category of Expenditure

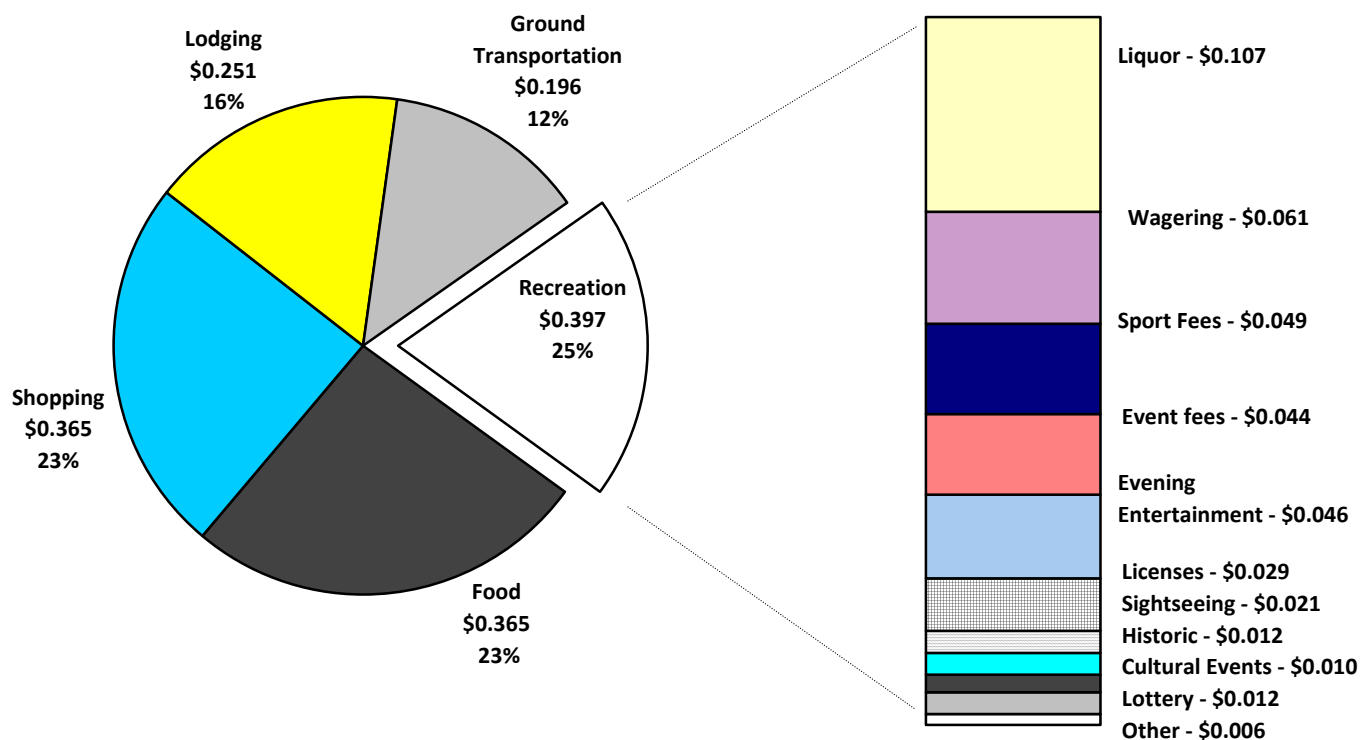
Shopping, food and recreation each accounted for about one-quarter (23%-25%) of traveler expenditures.

Lodging expenses represented 16% of the total estimated traveler expenditures (\$251.09 million).

Twelve percent of the Northeast Region traveler expenditures (\$196.09 million) were spent on ground transportation.

Figure 3.4

Estimated Northeast Region Traveler Expenditures
By Category of Expenditure
June 2007 – May 2008
(\$ Billions)



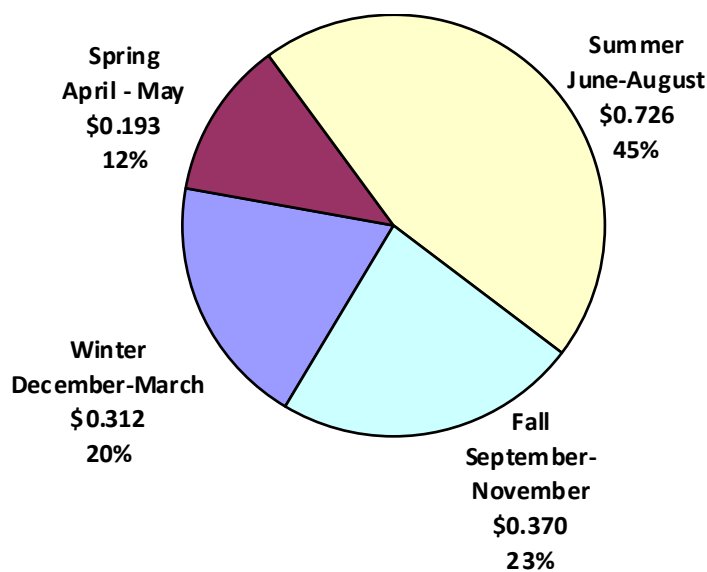
Total: \$1.601 Billion

3.5 Estimated Traveler Expenditures By Season

Travelers spent \$726 million, or 45% of all traveler expenditures, in the summer season (June through August). They spent \$370 million, or 23% of all traveler expenditures, in the fall season (September through November) and \$193 million, or 12% of all traveler expenditures in the spring season (April through May). Finally, travelers spent \$312 million, or 20% of total traveler expenditures, in the winter season (December through March).

Figure 3.5

Estimated Traveler Expenditures
By Season
June 2007 – May 2008
(\$ Billions)



Total: \$1.601 Billion

4.0 The Impact of Traveler Expenditures on the Northeast Region

4.1 Summary

The estimated expenditures by travelers in the Northeast Region during the period June 2007 through May 2008 supported 33,500 full-time-equivalent jobs and provided residents with wages, salaries and proprietary income of \$668.4 million. Traveler expenditures also generated \$194.8 million in state government revenues and \$59.8 million in local government revenues.

4.2 Direct and Total Impact: An Explanation

In the text and figures which follow to describe the impact of traveler expenditures on Minnesota, both direct and total impacts are mentioned.

- **Direct** impacts are those economic benefits due directly to the traveler expenditures. For example, when traveler expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and wages.
- **Total** impacts include all of the direct impacts but also include the estimated indirect impacts. Indirect impacts are the additional jobs and wages supported during additional rounds of spending. For example, the front desk clerk pays income tax and property tax which are an indirect result of tourist expenditures. The front desk clerk also pays her utility bills, buys food for her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

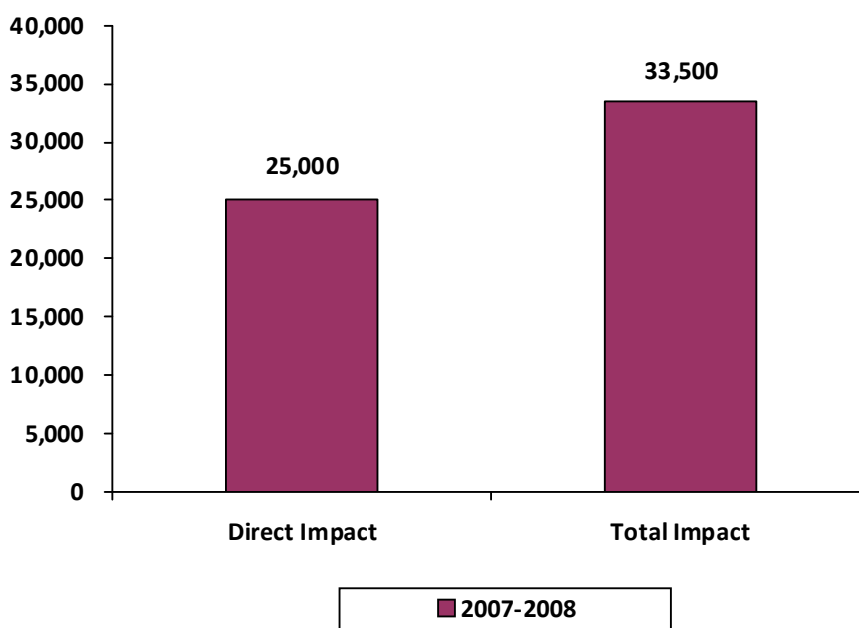
As noted, this report includes direct and total impacts which include both direct and indirect impacts.

4.3 Impact on Jobs for the Northeast Region

During the period June 2007 through May 2008, traveler expenditures in the Northeast Region supported 33,500 full-time equivalent jobs in **total**. About three-quarters of these jobs (75%) were **directly** supported by total estimated traveler expenditures in the Northeast Region (25,000).

Figure 4.3

Resident Employment Impact of Traveler Expenditures
June 2007 – May 2008

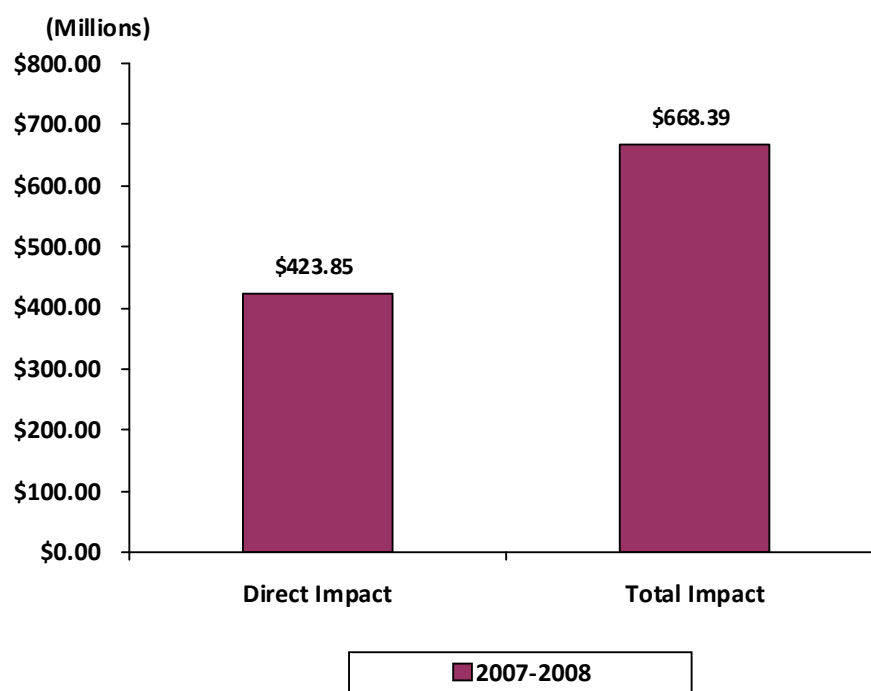


4.4 Impact on Wages, Salaries and Proprietary Income for the Northeast Region

Traveler expenditures in the Northeast Region during the period June 2007 through May 2008 generated \$668.39 million in resident wages and proprietary income in **total**. Nearly two-thirds of this resident income was **directly** generated by traveler expenditures (\$423.85 million or 63%).

Figure 4.4

Resident Income Impact of Estimated Traveler Expenditures June 2007 - May 2008



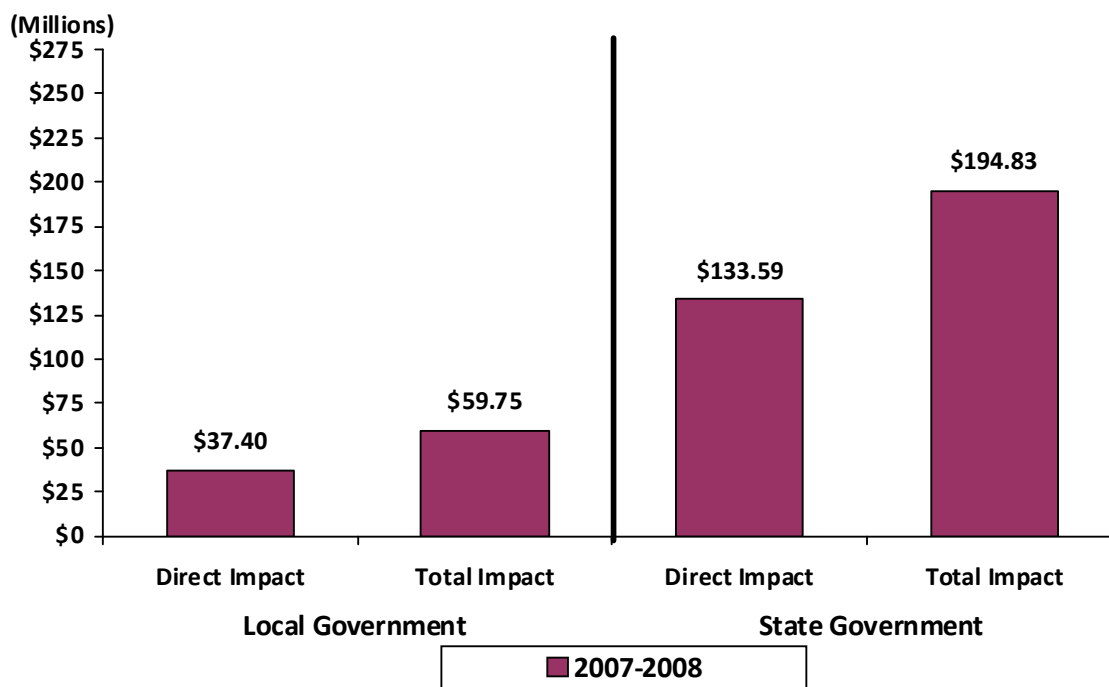
4.5 Impact on State and Local Government Revenues

Traveler expenditures in the Northeast Region led to the receipt of \$194.8 million in state government revenues and \$59.8 million in local government revenues in **total** during the period June 2007 through May 2008.

During the period June 2007 through May 2008 the state government collected \$133.6 million and local governments collected \$37.4 million that were **directly** attributable to traveler expenditures.

Figure 4.5

**Impact of Traveler Expenditures on
State and Local Government Revenues**
June 2007 - May 2008



5.0 The Northeast Region Lodging and Campground Industry

5.1 Summary

For **hotels/motels/B&Bs**, three-fifths of the available room-nights were sold at a rate of nearly \$80 per night. Travelers typically traveled as parties of two and stayed two nights. Three-fifths of the travelers were on pleasure trips and one-quarter on business trips with seven in ten of the rooms booked by Minnesota residents and the remainder booked by out-of-state travelers.

While **resort** unit rates were higher at nearly \$160 per night the party size was likely to be four and they stayed three nights. About half the resort units offered were rented. Three-quarters of resort guests were Minnesota residents.

Campground sites were rented at \$21 per night with an occupancy rate of 36%. Campers traveled in parties of two to three and stayed an average of two nights. Three out of five campers were Minnesota residents.

5.2 Hotel/Motel/B&B Inventory

During June 2007 through May 2008, 213 properties with 8,149 rooms made 2.56 million room-nights available to the public and sold 1.53 million of those room-nights to travelers staying for fewer than 30 nights.

5.3 Hotel/Motel/B&B Room Rates and Occupancy

The overall average daily room rate at Northeast Region hotels/motels/B&Bs was \$78.92 during June 2007 through May 2008.

Hotels/motels/B&Bs had an average occupancy rate of 60%.

Table 5.3
Room Rates and Occupancy by Season
(Hotels/Motels/ B&Bs)

	June 2007- May 2008 TOTAL	June- August 2007	September- November 2007	December 2007 - March 2008	April- May 2008
Average daily room rates*	\$78.92	\$105.49	\$68.75	\$73.11	\$72.10
Average occupancy*	60%	79%	60%	51%	47%
Total available room-nights (in millions)	2.56	0.63	0.64	0.85	0.44
Total occupied room-nights (in millions)	1.53	0.50	0.39	0.44	0.21

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied room-nights as a percentage of total available room-nights, excluding from both figures any rooms rented for 30 nights or more.

5.4 Hotel/Motel/B&B Guest Party Size and Length of Stay

Hotel/motel/B&B property managers reported that their guests typically traveled in parties of two and stayed an average of two nights.

Table 5.4

Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Hotels/Motels/B&Bs)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Average party size*	1.86	2.50	1.72	1.65	1.75
Average length of stay*	1.84	1.83	1.73	1.86	2.02

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

5.5 Hotel/Motel/B&B Guest Trip Purpose and Guest Origin

Hotel/motel/B&B property managers reported that half were traveling for pleasure (57%). About two out of five guests were traveling either for business (26%) or to attend meetings and conventions (17%).

Managers reported that about three in four of their guests were Minnesota residents (70%).

Table 5.5

**Management's Estimate:
Trip Purpose and Guest Origin by Season
(Hotels/Motels/B&Bs)**

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Trip Purpose					
Pleasure	57%	68%	62%	52%	46%
Business	26%	17%	23%	30%	37%
Meetings/conventions	17%	15%	15%	18%	17%
Guest Origin					
<u>Out of state</u>	<u>30%</u>	<u>37%</u>	<u>32%</u>	<u>26%</u>	<u>28%</u>
U.S.	20%	20%	26%	17%	16%
Canada	9%	16%	5%	7%	12%
Other foreign	1%	1%	*	1%	*
Minnesota	70%	63%	68%	74%	72%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.6 Resort Inventory

Some 300 resorts had 4,094 units available to the public. Resorts made 1.2 million unit-nights available over the 12-month period and sold 620,000 unit-nights to guests who stayed fewer than 30 nights.

5.7 Resort Unit Rates and Occupancy

The average unit rate for a resort was \$157.77 during the period June 2007 through May 2008.

Occupancy rates for resorts averaged 52%.

Table 5.7

Unit Rates and Occupancy by Season
(Resorts)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Average daily unit rates*	\$157.77	\$180.23	\$168.82	\$138.89	\$146.42
Average occupancy*	52%	80%	44%	37%	33%
Total available unit-nights (in millions)	1.20	0.38	0.30	0.33	0.19
Total occupied unit-nights (in millions)	0.62	0.30	0.13	0.12	0.06

*The bases for these statistics are weighted by the number of units that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied unit-nights as a percentage of total available unit-nights, excluding from both figures any units rented for 30 nights or more.

5.8 Resort Guest Party Size and Length of Stay

Property managers of the Northeast Region resorts reported that guests at their locations usually traveled in groups of three to four and stayed three nights on average.

Table 5.8

Management's Estimate:
Average Guest Party Size and Length of Stay By Season
(Resorts)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Average travel party size	3.53	3.51	3.61	3.48	3.69
Average length of stay	3.01	4.08	3.01	2.30	2.68

5.9 Resort Guest Trip Purpose and Guest Origin

According to property managers' estimates, virtually all resort guests (94%) were traveling on a pleasure trip.

Managers reported that three guests in four were Minnesota residents (76%), while the remaining guests lived outside the state.

Table 5.9
Management's Estimate:
Trip Purpose and Guest Origin by Season
(Resorts)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Purpose of guests' trip:					
Pleasure	94%	93%	89%	96%	94%
Business	3%	2%	5%	3%	4%
Meetings/conventions	4%	5%	6%	1%	1%
Guest Origin:					
<u>Out of State</u>	<u>24%</u>	<u>30%</u>	<u>20%</u>	<u>22%</u>	<u>19%</u>
U.S.	18%	25%	18%	13%	15%
Canada	5%	3%	1%	8%	3%
Other Foreign	1%	2%	*	*	1%
Minnesota	76%	70%	80%	78%	81%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.10 Campground Inventory

The Northeast Region campground providers offered 6,498 sites in 164 campgrounds to the public for use during the 2007-08 year. That yielded a total of 1.25 million site-nights available, with 0.45 million site-nights sold to guests staying fewer than 30 nights. Campgrounds on both public and private lands are included in the inventory.

5.11 Campground Site Rates and Occupancy

The average rate for a campground site was \$20.71.

Occupancy rates for the Northeast Region campgrounds were 36%.

Table 5.11
Site Rates and Occupancy by Season
(Campgrounds)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Average site rate*	\$20.71	\$23.12	\$21.52	\$10.90	\$25.61
Average occupancy*	36%	62%	27%	2%	18%
Total available site-nights (in millions)	1.25	0.53	0.30	0.20	0.22
Total occupied site-nights (in millions)	0.45	0.33	0.08	**	0.04

*The bases for these statistics are weighted by the number of sites that are open in each quarter. Yearly averages are weighted by quarter.

**Less than 0.01 million (10,000).

Note: Average occupancy is calculated by taking total occupied site-nights as a percentage of total available site-nights, excluding from both figures any sites rented for 30 nights or more.

5.12 Campground Guest Party Size and Length of Stay

The Northeast Region campers typically traveled in parties of two to three and spent an average of two nights while visiting, according to campground managers.

Table 5.12

Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Campgrounds)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Average travel party size	2.58	2.76	2.26	1.90	3.53
Average length of stay	2.22	2.72	2.05	0.95*	2.88

* Note: Includes campgrounds which were open but had no sites rented, resulting in an average length of stay less than 1 night.

5.13 Campground Guest Origin

The Northeast Region campground managers reported that three in four Northeast Region campers (69%) were Minnesota residents.

Table 5.13
Management's Estimate:
Guest Origin by Season
(Campgrounds)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007 - March <u>2008</u>	April- May <u>2008</u>
Guest Origin:					
<u>Out of State</u>	31%	34%	24%	40%	26%
U.S.	21%	22%	24%	15%	19%
Canada	10%	11%	*	25%	7%
Other Foreign	*	1%	--	--	--
Minnesota	69%	66%	76%	60%	74%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

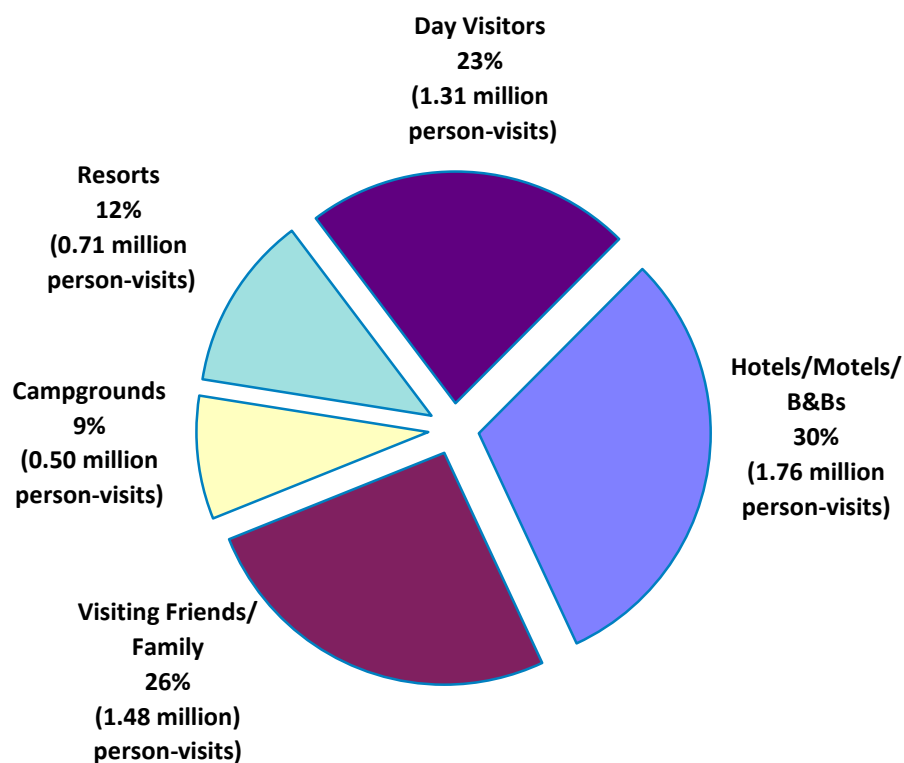
6.0 Travel Volume in the Northeast Region

Person-visits in the Northeast Region totaled 5.77 million during the period June 2007 through May 2008. A total of 4.45 million were overnight person visits – one person staying in one accommodation. In addition, day travelers in the Northeast Region were estimated at 1.31 million.

Hotel/motel/B&B guests represented 31% of person-visits while travelers staying with family and/or friends represented 26%. Campers accounted for 9% of person-visits, while travelers staying in resorts made up 12% of the person-visits in the Northeast Region in June 2007 through May 2008.

Figure 6.0

The Northeast Region Person-Visits



TOTAL: 5.77 Million Person-Visits

Note: A **person-visit** is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 5.77 million person-visits should not necessarily be interpreted as 5.77 million travelers.

7.0 The Profile of the Northeast Region Travelers

This section details the findings concerning the profile of Northeast Region travelers overall and by each season during the period from June through May. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

7.1 Demographic and Socioeconomic Profile

- The average age of Northeast Region travelers was 41.8 years. Travelers in the fall season (45.4 years) tended to be older than travelers in all other seasons (38.4 to 42.1 years).
- The median household income was \$61,800. There were no significant differences in median incomes among Northeast region travelers by season.
- Nine travelers in ten identified themselves as white (92%).
- Nearly all Northeast Region travelers lived in the United States (94%) and two-thirds were residents of Minnesota (66%). Beyond Minnesota, the state with the next highest proportion of Northeast Region travelers was Wisconsin (6%).

The proportion of in-state travelers was lower in the summer (59%) than in other seasons (67%-73%). Wisconsin visitors were more likely to visit during the winter (9%) than in the fall (4%).

- About half of Northeast travelers (48%) lived in the Minneapolis-St. Paul Designated Market Area (DMA)*. This proportion was higher in the winter season (54%) than in the summer season (46%). About one in five (18%) reside in the Duluth-Superior DMA. The incidence of Northeast travelers who reside in any other DMA was 3% or less.

*Designated Market Area or DMA is a group of counties in the United States that are covered by a specific group of television stations. There are 210 DMAs in the United States.

Table 7.1:
Demographic and Socioeconomic Profile by Season

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	655	264	158	114	119
Age:					
18 to 24	14%	12%	10%	24%	12%
25 to 29	11	10	9	10	13
30 to 39	20	21	17	18	24
40 to 49	23	23	20	22	26
50 to 59	18	19	20	16	18
60 to 64	6	6	11	5	3
65 and older	6	6	10	4	3
No Answer	3	4	3	1	1
Average Age	41.8	42.1	45.4	38.4	39.8
Income:					
Less than \$25,000	9%	7%	11%	12%	10%
\$25,000 to \$34,999	9	10	10	6	8
\$35,000 to \$49,999	16	19	10	18	16
\$50,000 to \$74,999	21	22	20	21	20
\$75,000 to \$99,999	15	16	11	15	19
\$100,000 to \$124,999	9	8	11	10	10
\$125,000 to \$149,999	4	3	4	5	4
\$150,000 or more	5	4	7	7	5
No Answer	11	11	19	6	8
Estimated Median Income	\$61,800	\$59,000	\$63,300	\$63,500	\$64,700
Gender:					
Male	47%	45%	48%	54%	46%
Female	46	48	45	39	48
No Answer	7	8	6	7	6
Racial/Ethnic Background:					
White	92%	92%	92%	93%	89%
American Indian	2	2	2	2	1
Asian	1	1	1	1	3
Black	1	1	2	*	2
Hispanic	1	1	2	1	1
Other	1	1	1	2	1
No Answer	3	3	2	2	3

* Less than 0.5%

Table 7.1 (cont'd)
Demographic and Socioeconomic Profile

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	655	264	158	114	119
Residence:					
<u>United States</u>	<u>94%</u>	<u>93%</u>	<u>92%</u>	<u>98%</u>	<u>96%</u>
Minnesota	66	59	67	73	71
Wisconsin	6	5	4	9	8
Iowa	2	3	3	1	1
North Dakota	2	3	1	4	*
Other state	7	7	10	5	7
State not specified	11	17	7	8	9
Outside U.S.	5	4	8	2	3
No Answer	1	2	*	*	1
Residence by DMA:					
Minneapolis-St. Paul	48%	46%	48%	54%	49%
Duluth-Superior	18	12	19	21	25
Fargo-Valley City	3	3	2	4	*
LaCrosse-Eau Claire	2	2	1	2	1
Other DMAs	13	14	15	9	12

* Less than 0.5%

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category. DMAs with responses less than 2% among the total sample have been aggregated into the "Other DMAs" category.

7.2 Travel Party and Trip Profile

Travel Party

- Just over three-quarters of travelers in the Northeast Region were on a vacation or short pleasure trip (79%), while nearly one in five was traveling for personal reasons, e.g., wedding, funeral, medical, etc. (15%).

Travelers in the summer season were the most likely to be traveling for a vacation or short pleasure trip (88%) and the least likely to be traveling for personal reasons (9%). Fall season travelers (12%) were more likely than travelers in other seasons to be visiting the Northeast Region for business or work.

- The average travel party size was 2.8 people. Travelers in the summer (2.9 people) and spring (3.0 people) were more likely to have larger travel parties than those in the fall (2.6 people).
- The average number of nights travelers intended to stay overnight was 2.9 nights. The length of stay was longer in the summer (3.3 nights) than it was in the winter or spring (2.5 and 2.6 nights respectively).
- Seven Northeast Region travelers in ten had no children younger than 18 in their travel party (71%). Fall (84%) and winter (74%) season travelers were more likely than spring (63%) and summer (65%) season travelers to be traveling without children.
- The vast majority of Northeast Region travelers had taken a trip in Minnesota in the last five years (94%), with an estimated median of 7.3 trips among these travelers.

Trip Profile

- Three Northeast Region travelers in four (75%) stayed in *paid* accommodations on their trip, primarily in hotels/motels/historic inns (54%). One in ten stayed in *unpaid* accommodations (11%). Just over one-tenth of travelers in the Northeast Region said they were taking a day trip (14%) and did not stay in any type of overnight accommodations on their trip.
- Winter season travelers were more likely to stay in a hotel/motel/historic inn (69%) than were travelers in other seasons. Fall season travelers were more likely to have stayed at a resort (9%) than were summer season travelers (5%). Summer travelers were more likely to have stayed in an RV at a campground (12%) than travelers in other seasons. Summer (7%) and spring (10%) travelers were more likely to have stayed in a tent at a campground than fall and winter travelers.
- Travelers participated in numerous activities during their trip. Dining out (70%), shopping (49%), sightseeing or driving for pleasure (45%), hiking (34%) and visiting state or national parks (33%) were among the most frequently mentioned trip activities.

General Activities

Dining out was a key activity for Northeast Region travelers in all seasons (70%) but less so in the spring (60%) than in other seasons. Sightseeing or driving for pleasure was more prevalent among spring (60%), summer (58%) and fall (37%) season travelers than it was among winter (12%) season travelers. This same pattern was true for driving on designated scenic byways and taking in city sites. Casino gaming was more often a winter activity (37%) and viewing fall colors more often a fall activity (30%). Fall and winter travelers (18% and 16%) were more likely than spring (9%) travelers to enjoy the Northeast Region's nightlife or evening entertainment.

Active Recreation

Two-thirds of Northeast Region travelers participated in "active" recreation (66%). The array of activities was diverse, with hiking (34%) and pool swimming (16%) topping the list. Winter season travelers were the less likely to participate in any active recreation (55%) when compared with travelers in other seasons.

Hiking was the top active recreation pursuit among travelers in the summer (44%), fall (30%), and spring (47%) seasons. In comparison, only 3% of winter travelers said they went hiking on their trip.

The proportion of travelers who were wildlife viewing or bird watching was also much lower during the winter season (2%) than among travelers in other seasons. Instead, downhill skiing/snowboarding (28%), snowmobiling (14%), cross-country skiing (8%), and ice fishing (5%) were more prevalent activities among winter travelers.

Shopping

Half of Northeast Region travelers did some type of shopping on their trip (49%), mostly for gifts or souvenirs (33%). Shopping was mentioned as an activity less often among winter travelers (30%) when compared with travelers in other seasons, particularly shopping for gifts or souvenirs (11%) and for arts, crafts, and antiques (5%). General or mall shopping was more prevalent among fall travelers (25%) versus winter (12%), summer (13%) and spring (9%) travelers. Summer and fall travelers were more likely to go outlet shopping (7% and 9% respectively) than were winter (2%) and spring (3%) travelers.

Visiting People or Places

One-third of Northeast Region travelers indicated they were visiting state or national parks (33%) and one-quarter were visiting historic sites (24%). One in five said they were visiting friends or relatives (21%). The proportion of travelers visiting friends and relatives was higher in the fall (35%) than in other seasons. Travelers in the summer, spring, and fall seasons were more likely than winter season travelers to visit:

- State or national parks (44% summer, 24% fall, 48% spring vs. 3% winter);
- Historic sites (34% summer, 19% fall, 30% spring vs. 3% winter); and
- Other [than art] museums (24% summer, 12% fall, 18% spring vs. 3% winter).

Attending Events

Only one traveler in four indicated that they attended an “event” while on their trip in the Northeast Region (27%). The incidence of attending an event was highest among fall travelers (38%) and lowest among spring season travelers (10%).

Fall and winter travelers (20% and 13%) were more likely to attend amateur sporting events than summer (3%) and spring (2%) travelers. Summer and fall travelers (14% and 13%) were more likely than winter and spring travelers to attend fairs or festivals.

Table 7.2
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June- May <u>Total</u>	June- August <u>(Summer)</u>	September -November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	655	264	158	114	119
Trip Purpose (multi-response):					
Vacation or short pleasure trip	79%	88%	70%	72%	79%
Personal (e.g., wedding, funeral, medical, etc)	15	9	18	25	16
Business or work	7	5	12	4	6
Convention or conference	2	2	2	3	3
No Answer	2	1	3	2	1
Travel Party Size:					
1 person	10%	8%	8%	16%	10%
2 people	44	42	58	38	35
3 to 4 people	31	33	22	31	38
5 or more people	15	17	12	16	16
Average Travel Party Size	2.8	2.9	2.6	2.8	3.0
Total Trip Length of Stay:					
Daytripper	14%	15%	16%	10%	16%
1 night	16	14	16	27	9
2 nights	34	25	33	40	52
3 to 6 nights	30	40	29	18	19
7 or more nights	6	7	6	6	3
Average Nights (Excluding Daytrippers)	2.9	3.3	3.0	2.5	2.6
Children in Travel Party					
One or more children under 18 years old	29%	35%	16%	26%	37%
No children	71	65	84	74	63
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	89%	86%	96%	94%	83%
One or more	11	14	4	6	17
<i>6 to 11 years old</i>					
None	86%	82%	91%	90%	83%
One or more	14	18	9	10	17
<i>12 to 17 years old</i>					
None	84%	81%	93%	83%	82%
One or more	16	19	7	17	18

* Less than 0.5%

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	655	264	158	114	119
Minnesota Trips in Last 5 Years					
None	6%	6%	8%	2%	6%
1 trip	4	5	2	2	2
2 to 4 trips	26	26	26	26	27
5 to 10 trips	30	29	31	29	29
More than 10 trips	33	31	30	39	36
No Answer	2	1	3	2	*
Estimated Median Trips	7.3	7.0	6.9	8.2	7.7
Lodging:					
<u>Paid Accommodations</u>	<u>75%</u>	<u>75%</u>	<u>71%</u>	<u>80%</u>	<u>75%</u>
Hotel/Motel/Historic Inn	54	48	57	69	49
Resort	7	5	9	6	8
In an RV at a campground	6	12	2	*	1
In a tent at a campground	5	7	*	*	10
Vacation home/condo/cabin/houseboat you rented	4	3	1	4	7
Bed & Breakfast	*	1	*	1	*
<u>Unpaid Accommodations</u>	<u>11%</u>	<u>11%</u>	<u>14%</u>	<u>10%</u>	<u>9%</u>
Home of family or friends	7	5	12	8	7
Vacation home/condo/cabin/houseboat of family or friend	2	3	*	1	*
At your vacation home/condo/cabin/houseboat	2	2	2	*	2
At a campground with no fee	*	1	*	*	*
<u>Day tripper</u>	<u>14%</u>	<u>15%</u>	<u>16%</u>	<u>10%</u>	<u>16%</u>

* Less than 0.5%

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	655	264	158	114	119
Activities:					
<u>General (checked one or more below)</u>	<u>89%</u>	<u>89%</u>	<u>88%</u>	<u>88%</u>	<u>91%</u>
Dining out	70	69	77	75	60
Sightseeing or driving for pleasure	45	58	37	12	60
Driving on designated scenic byways	32	42	30	8	37
Taking in city sites	24	36	16	8	23
Casino gaming	17	16	13	37	9
Nightlife or evening entertainment	15	15	18	16	9
Viewing fall colors	8	3	30	*	*
<u>Participating In (checked one or more below)</u>	<u>66%</u>	<u>71%</u>	<u>62%</u>	<u>55%</u>	<u>70%</u>
Hiking	34	44	30	3	47
Pool swimming	16	20	15	9	17
Fishing	12	16	10	*	17
Wildlife viewing or bird watching	12	18	9	2	13
Biking	9	14	6	*	10
Lake/river swimming	9	18	2	*	8
Canoeing	6	10	2	*	8
Downhill skiing or snowboarding	6	*	4	28	2
Golfing	5	10	2	*	4
Snowmobiling	4	*	6	14	2
Motor boating/water skiing	3	4	3	*	1
Cross-country skiing	2	*	2	8	*
Hunting	2	*	7	*	2
Off-road ATV driving	2	2	3	1	3
Ice Fishing	1	*	*	5	2
Jet skiing	1	1	*	*	2
Other activity	10	10	15	8	4

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	655	264	158	114	119
<u>Shopping (checked one or more below)</u>	<u>49%</u>	<u>58%</u>	<u>53%</u>	<u>30%</u>	<u>44%</u>
For gifts or souvenirs	33	43	31	11	34
Arts, crafts, or antiques	16	20	22	5	11
General or mall shopping	15	13	25	12	9
Outlet shopping	6	7	9	2	3
At the Mall of America	3	2	4	2	3
<u>Visiting (checked one or more below)</u>	<u>66%</u>	<u>82%</u>	<u>60%</u>	<u>18%</u>	<u>84%</u>
State or national parks	33	44	24	3	48
Historic sites	24	34	19	3	30
Friends or relatives	21	21	35	9	12
Other museums	16	24	12	3	18
Art museums	8	11	9	*	7
Amusement parks or carnivals	6	8	6	2	5
Indian areas	4	5	5	2	3
Indoor water parks	3	2	4	2	4
Outdoor water parks	2	2	4	*	*
Other attraction	10	11	11	2	13
<u>Attending (checked one or more below)</u>	<u>27%</u>	<u>30%</u>	<u>38%</u>	<u>23%</u>	<u>10%</u>
Fairs or festivals	9	14	13	*	4
Amateur sporting events	8	3	20	13	2
Other events	6	11	1	4	2
Popular music concerts or shows	3	4	2	4	4
Theater performances	3	4	3	*	2
Professional sporting events	2	1	6	2	*
Classical music concerts	1	1	1	*	1
No Answer	1	1	2	2	1

* Less than 0.5%

7.3 Travel Planning Sources

Among 2007-2008 Northeast Region travelers, the most frequently cited information sources used in trip planning were friends/relatives/co-workers (47%) and the Internet (43%). Few travelers said they used each of the other sources of trip planning information (9% or less).

Travelers in the summer or winter seasons were less likely to use the Internet (40% and 37% respectively) than those in the spring season (57%). Travelers in the fall were more likely to have used friends/relatives/co-workers (51%) as their information source as compared with travelers in the spring season (31%).

Table 7.3:
Travel Planning Sources

	June 2007 – May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Friends/relatives/co-workers	47%	49%	51%	47%	31%
Internet	43	40	45	37	57
Brochure/travel guide	9	12	9	4	8
Newspaper/magazine	3	5	2	1	2
Newspaper/magazine	3	5	2	1	2
Local tourism bureau	2	3	1	1	3
State Travel Office	2	3	1	*	3
TV/radio	2	5	*	1	*
Visitor/welcome center	2	4	*	*	3
Airline/travel agency	1	*	2	1	5
Other	18	17	26	21	6

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

Appendix A: Procedures

Technical Appendix: The Research Procedures

Introduction

The basic procedure employed in this project is the T-MAP-I economic impact model. *Davidson-Peterson Associates* first employed this procedure in 1985 for the State of Georgia. Since then, it has been used to estimate traveler expenditures in states and local areas throughout the United States.

A. What is Economic Impact?

Economic impact begins when a traveler to an area spends any amount of money on any product or service in that area. The **direct** recipients of traveler expenditures use these dollars to earn income, pay wages, and pay taxes thus creating a **direct impact** on the local economy. But the benefits to the local economy extend beyond the direct impact of these dollars. Traveler expenditures create a chain effect. When businesses and their employees spend *their* income in the state, they create an **indirect impact** by supporting additional jobs, wages, salaries, proprietary income and tax revenues. The sum of the **direct** and **indirect impact** equals the total economic impact of traveler expenditures.

B. What is a Traveler?

For purposes of this study, a traveler is anyone who stays overnight one to 29 nights or who is on a day trip in an area that is at least 50 miles from their primary residence. Travelers may be motivated to travel by pleasure, personal, or business reasons or some combination of reasons. If they remain in the area for more than 30 days, they cease being a traveler. If they are staying in accommodations contracted for more than a 30-day period (construction workers or truck drivers, for example), they are not classified as travelers and the rooms they occupy are not included in those occupied by travelers.

This report and the T-MAP-I procedure are based on the premise that economic impact begins with the expenditure of dollars by travelers (bottom-up measurement) rather than receipts of selected businesses (top-down measurement) – a more traditional tool of economic analysis.

Davidson-Peterson Associates does **not** use the traditional top-down or industry receipts-based. In this study:

- Sales tax data or industry receipts are not employed;
- Measurements begin with **every dollar** travelers spend;
- North American Industry Classification System (NAICS) codes are **not** used;
- **Travelers** define where they spend money.

C. Additional Explanations

- Top-down or industry receipts-based measures assume that an industry is composed of a set of businesses that are clearly designated by customary NAICS codes. For most industries this works well. However, when applied to tourism, this method tends to underestimate the economic impact, in part because businesses are not able to separate traveler expenditures from resident expenditures.
- Tourism is not a typical industry, and cannot be represented in its entirety by a few NAICS-classified businesses. Tourism is the movement of people into an area for a brief period of time. Its economic impact begins with the sum of every dollar travelers spend on lodging, retail purchases, gas, food, entertainment or any other goods or services people buy.
- When travelers spend dollars, they spend them in many of the same “traditional industries” as local residents. While these businesses (such as retail stores, restaurants and gas stations) are identified by NAICS codes, there is simply no way to separate the purchases of travelers from those of local residents. The bottom-up procedure employed by *Davidson-Peterson Associates* is based on all traveler expenditures in all industries.

This procedure for assessing economic impact provides accurate estimates of current year figures.

Methods and numbers are constantly being reviewed to improve the estimating procedures.

D. The Basic Research Steps for the 2007-2008 Northeast Region Effort

What follows is a brief description of the procedures for estimating economic impact as they were completed in 2007-2008.

1. Lodging Inventory Update

At the beginning of the 2007-2008 study, Davidson-Peterson Associates received a copy of the inventory of lodging properties maintained by Explore Minnesota Tourism. This list was compared to the ending inventory from the 2005-2006 study. Any additions or deletions gathered from this comparison were incorporated into the starting inventory for the 2007-2008 study. In addition, the seasonal surveys of lodging business activity (see #2 below) allowed for further clarifications and refinements.

New properties in the updated inventory are systematically sampled so as to have representation in the overall sampling plan for each season.

2. Sampling

For each season, open properties in each of three categories (hotels/motels/B&Bs, resorts, and campgrounds) were arrayed by size and cumulative totals calculated. A random number was used to select the first property and a skip pattern developed to identify 400 properties for interviewing chosen with size taken into account. Since the seasons were sampled independently some large properties were selected more than once but all open properties had a chance of being selected each season.

3. Seasonal Survey of Paid Lodging Business Activity

Every property included in the state survey sample was contacted and asked to complete a survey questionnaire by phone. Those who did not participate by phone were asked to complete the survey via fax, email, or mail. Additional properties in counties participating in special economic impact studies are added to the state sample.

A total of 923 contacts with lodging properties in the Northeast Region were made during the course of the year resulting in 718 completed surveys as follows:

Number of Interviews by Season (Northeast Region)			
Season	Interview Period	# Contacted	# Completed
Summer	June - August	232	182
Fall	September - November	224	177
Winter	December - March	235	186
Spring	April - May	232	173

4. Resident (VFR) Survey

To determine the incidence of visiting friends and relatives (VFR) in the state, telephone interviews were conducted with a random sample of Minnesota households. Data from these interviews was projected to the total state household population.

A total of 1,000 VFR interviews were completed during the 2007-2008 period, with an equal proportion of interviews conducted each season.

5. Traveler Expenditure Survey/Modeling

To represent the proportion of traveler expenditures spent on specific types of goods and services, travelers were surveyed on-site while in Minnesota. The traveler expenditure ratios obtained from the on-site interviews were applied to derive the total expenditures by category. The Traveler Expenditure surveys form the basis of the Traveler Profile Survey reported elsewhere.

A total of 2,023 Traveler Expenditure surveys were completed during the period June 2007 through May 2008 at a variety of sites across Minnesota. Sites were chosen by selecting a county and zip code for each region based on the array of properties by size. Essentially, the counties where a sizable volume of overnight accommodations exist to serve travelers had a greater chance to be selected. Within the selected zip codes, an array of sites were chosen to maximize the ability to find a variety of tourists on site. The table below shows the total number of completed interviews by season.

Number of Interviews by Season (Statewide)

Season	Interview Period	# Completed
Summer	June – August	795
Fall	September – November	364
Winter	December – March	480
Spring	April – May	384

Roughly equal proportions of interviews were completed in each of the four Explore Minnesota Tourism regions. Of the 2,023 questionnaires, a small number were excluded from the economic impact sample due to their failure to complete all five questions necessary to include their responses in the model. The combined total of interviews from the 2005-2006 and the 2007-2008 study periods were used to calculate the expenditure ratios by spending category, which were then applied to the state and each of its four regions.

6. Economic Impact Data Calculations

Room, unit and campsite rates and occupancy were used to estimate the total expenditures at each type of accommodation. The traveler expenditure ratios were applied to this figure to derive the total traveler expenditures by those staying in each type of accommodation, in each region, and in each season.

7. Input/Output (I/O) Modeling

A special inter-industry model constructed for Minnesota utilizes the total tourism expenditures to determine the estimates of employment, income, and government revenue impacts (both direct and total) of those state tourism expenditures. Models were also developed for each of the four tourism regions. Please note that the regional impacts will not add to the state totals. Revenue leaked from one region to another is excluded from the region totals but included in the state total.

E. Limitations on Comparisons of Results between Study Periods (2005-2006 vs. 2007-2008)

Comparisons of economic impact results between the 2007-2008 study and the 2005-2006 study are limited due to the following:

1. Traveler Expenditure and Visitation Volume Estimates

The traveler expenditure and visitation volume estimates were arrived at using the data collected from the three surveys described in Section D. The basic procedures employed in calculating these volumetric estimates were the same for the two study periods.

However, during the course of the 2007-2008 period, additional data and/or new information was collected in the Seasonal Survey of Paid Lodging Business Activity that was not available when the prior study's traveler expenditure estimates were made, including:

- Changes in the lodging inventory that were unidentifiable during the prior study (such as property expansion, closed properties, increased number of rooms, etc.);
- Properties that did not participate in the previous study but have participated in the current study; or
- Properties that participated in the previous study but were able to provide more complete or more accurate information in the current study.

Reconciling these differences and revising the expenditure estimates for the 2005-2006 study was not included in the scope of the current research program. As a result, there is some degree of incongruity between the traveler expenditure and visitation volume estimates in 2007-2008 and 2005-2006.

2. Input-Output Modeling

The input-out model has been revised since the 2005-2006 study period. The model revisions encompass:

- Updates in the U.S. government data sources used to construct the model, e.g., County Business Patterns, Regional Economic Information System, State and Local Government Finance data; and
- Revisions to the modeling procedures (i.e., interactions of the impact adjustments) within the input-output model to refine and improve estimates generated.

Therefore, the model used to generate the 2007-2008 direct and total economic impact estimates is not equivalent to that used to generate the 2005-2006 estimates and comparisons of results should not be made.

3. Lodging Inventory Classification

In the 2007-2008 study, Explore Minnesota Tourism undertook a review of indoor lodging properties in our lodging database with regard to their property type classification, i.e., hotels/motels/B&Bs, resorts, and campgrounds. This resulted in approximately 70 properties that were re-classified from the “hotels/motels/B&Bs” category to the “resorts” category. Therefore, the data presented **by accommodation type** in this report is not comparable to what was reported in the 2005-2006 annual report.

4. Seasonal Definitions

The definitions for the winter and spring seasons, i.e., the months included in each season, differ from the 2005-2006 study to the 2007-2008 study. In the 2007-2008 study, winter included December, January, February, and March (4 months) and spring included April and May (2 months). In the 2005-2006 study, winter included December, January, and February (3 months) and spring included March, April, and May (3 months). Therefore, the data presented **by season** in this report is not comparable to what was reported in the 2005-2006 annual report.

A summary of the key estimates from the 2005-2006 economic impact study is included in Appendix B, Table B-5 for reference only.

F. Additional Procedures for the Traveler Profile Study

Davidson-Peterson Associates used a stratified cluster sampling technique in an effort to represent all types of travelers across the four Minnesota regions. The technique allowed us to select systematically the geographic locations (i.e., zip codes) within each region that would form the sampling frame. Minimum quotas were established in total and by region to ensure that an adequate number of interviews were completed for the season.

To provide more robust sample sizes and include interviews at a broader selection of traveler sites, survey responses from the 2007-2008 study have been combined with those from the 2005-2006 study. The table below shows the total number of completed interviews among travelers **statewide** by year and season.

Number of Minnesota Traveler Interviews

Season	Interview Period	2007-2008	2005-2006	Total Interviews
Summer	June – August	795	869	1,664
Fall	September – November	364	449	813
Winter	December – March	480	580	1,060
Spring	April – May	502	394	778
Total	June - May	2,141	2,292	4,315

In total, 999 usable questionnaires were collected from travelers in the **Northeast Region** of Minnesota and returned to Davidson-Peterson Associates. Some 475 were conducted in June 2007 through May 2008 and 524 in June 2005 through May 2006.

To reflect seasonal and regional visitation patterns more accurately, Davidson-Peterson Associates balanced the sample of travelers from the Traveler Expenditure Survey according to the person-visit estimates from the economic impact portion of the research study (using the proportion of person-visits by season and region). With this modest weighting, the annual traveler profile study results are based on a sample of travelers in Minnesota which is balanced so as to be directly proportional to the estimated number of travelers by region and season.

The table on the following page shows the distribution across season and region for the following:

- The estimated proportion of person-visits in each season by region;
- The number of interviews completed in each season by region;
- The weights applied to the interviews to balance the sample to the desired number of interviews in each season by region; and
- The number of interviews in the balanced sample so that the proportion matches the person-visits proportion in each season by region.

**Sample Balancing by
Estimated Proportion of Person-Visits**

June 2007 through May 2008

	Proportion of Person-Visits	Actual Completes	Weights Applied	Balanced Completes
<u>June – August 2007</u>	<u>37.2%</u>	<u>795</u>		<u>751</u>
Metro	15.5%	216	1.449	313
Northcentral/West	8.1%	167	0.976	163
Southern	7.5%	229	0.660	151
Northeast	6.1%	183	0.676	124
 <u>September - November 2007</u>	 <u>24.2%</u>	 <u>364</u>		 <u>490</u>
Metro	11.5%	102	2.290	234
Northcentral/West	4.4%	67	1.323	89
Southern	4.7%	113	0.846	96
Northeast	3.6%	82	0.883	72
 <u>December 2007 - March 2008</u>	 <u>24.0%</u>	 <u>480</u>		 <u>486</u>
Metro	11.8%	137	1.747	239
Northcentral/West	4.7%	98	0.962	94
Southern	4.7%	122	0.780	95
Northeast	2.8%	123	0.464	57
 <u>April - May 2008</u>	 <u>14.6%</u>	 <u>384</u>		 <u>296</u>
Metro	6.9%	103	1.354	139
Northcentral/West	2.8%	100	0.574	57
Southern	2.7%	94	0.571	54
Northeast	2.3%	87	0.522	45
 <u>Total</u>	 <u>100.0%</u>	 <u>2,023</u>		 <u>2,023</u>
Metro	45.7%	558		925
Northcentral/West	19.9%	432		403
Southern	19.6%	558		396
Northeast	14.8%	475		299

Appendix B: Economic Impact – Supporting Tables

Table B-1

**Estimated Traveler Expenditures
By Category of Expenditure and
Accommodation Used
June 2007 through May 2008
(\$ Millions)**

	Paid Accommodations			No Lodging Expense		
	Hotels/ Motels/ B&Bs	Resorts	Camp- grounds	Visiting Friends/ Relatives	Day Tripper	TOTAL
Food	\$129.66	\$95.91	\$26.25	\$130.31	\$10.67	\$392.79
<u>Shopping</u>	<u>\$142.16</u>	<u>\$56.78</u>	<u>\$42.20</u>	<u>\$112.41</u>	<u>\$11.34</u>	<u>\$364.90</u>
General	79.98	22.28	23.44	76.99	5.86	208.54
Traveler	62.19	34.51	18.76	35.42	5.48	156.36
<u>Recreation</u>	<u>\$121.20</u>	<u>\$77.23</u>	<u>\$34.08</u>	<u>\$149.18</u>	<u>\$14.88</u>	<u>\$396.57</u>
Liquor	21.79	28.89	9.85	44.96	1.23	106.71
Historic	4.52	1.15	1.97	3.87	0.48	11.98
Sightseeing	10.92	3.21	1.39	4.90	0.53	20.95
Event fees	17.56	2.75	5.03	16.03	2.68	44.05
Sport fees	13.98	13.60	2.98	16.34	2.47	49.38
Cultural event fees	2.41	.80	.05	5.90	0.55	9.71
Evening entertainment	13.56	5.16	2.57	24.15	0.48	45.92
Licenses	4.35	11.31	3.31	9.41	0.39	28.76
Sweepstakes	2.70	1.64	.42	6.61	0.37	11.75
Wagering	29.13	8.06	6.00	12.54	5.63	61.36
Other	.29	.65	.51	4.47	0.08	6.00
Lodging	\$137.64	\$102.98	\$10.47	--	--	251.09
Ground Transportation	\$56.55	\$49.22	\$23.66	\$61.92	\$4.75	196.09
Total	\$587.21	\$382.12	\$136.67	\$453.81	\$41.64	\$1,601.44

Note: Columns of figures may not add to totals shown due to rounding.

Table B-2
**Estimated Traveler Expenditures
 By Season
 June 2007 through May 2008
 (\$ Millions)**

	June- August 2007	September- November 2007	December 2007-March 2008	April- May 2008	TOTAL
Food	\$176.03	\$91.70	\$76.62	\$48.44	\$392.79
<u>Shopping</u>	<u>\$164.64</u>	<u>\$84.65</u>	<u>\$71.15</u>	<u>\$44.46</u>	<u>\$364.90</u>
General	92.75	48.75	40.73	26.31	208.54
Traveler	71.89	35.90	30.41	18.16	156.36
<u>Recreation</u>	<u>\$178.77</u>	<u>\$92.35</u>	<u>\$74.99</u>	<u>\$50.46</u>	<u>\$396.57</u>
Liquor	49.29	24.78	18.99	13.65	106.71
Historic	5.55	2.74	2.20	1.49	11.98
Sightseeing	9.08	4.90	4.48	2.50	20.95
Event fees	19.54	10.26	8.60	5.65	44.05
Sport fees	22.18	11.58	9.61	6.00	49.38
Cultural event fees	3.98	2.38	1.98	1.36	9.71
Evening	19.77	10.96	8.91	6.28	45.92
Entertainment					
Licenses	14.06	6.47	4.68	3.56	28.76
Sweepstakes	5.20	2.74	2.07	1.74	11.75
Wagering	27.30	14.19	12.62	7.25	61.36
Other	2.81	1.36	.84	0.99	6.00
Lodging	\$114.59	\$56.83	\$53.45	\$26.33	\$251.09
Transportation	\$91.60	\$44.96	\$35.63	\$23.90	\$196.09
Total	\$725.62	\$370.49	\$311.84	\$193.49	\$1,601.44

Note: Columns of figures may not add to totals shown due to rounding.

Seasonal Analysis

	June- August 2007	September- November 2007	December 2007- March 2008	April- May 2008
Share of seasonal expenditures	45%	23%	19%	12%
Share of days in year	25%	25%	33%	17%
Ratio	1.80	0.93	0.58	0.72

Table B-3

**Estimated Traveler Expenditures
Average per Person per Day**

**June 2005 through May 2006 and
June 2007 through May 2008 Combined**

	Average Expenditures per Person per Day
Total - All Travelers	\$115.54
Travelers with Paid Accommodations	
Hotels/Motels/B&Bs	\$124.84
Resorts	\$119.13
Campgrounds	\$87.55
Travelers with No Lodging Expenses	
Visiting Friends/Relatives (or other unpaid lodging)	\$119.57
Day Trippers	\$26.57

Note: Estimated average expenditures per person per day are calculated from data collected among travelers surveyed on-site while on their Minnesota trip. Interview responses from the 2007-2008 study have been combined with those from the 2005-2006 study to generate these averages.

N/A = Insufficient number of responses within this category to report estimates.

Table B-4

**Estimated Impact of Traveler Expenditures
on the Economy of the Northeast Region
June 2007 through May 2008**

	June 2007-May 2008	
	Direct Impact	Total Impact
Employment (full-time job equivalents)	24,995,000	33,538,000
Resident Income (wages, salaries, and proprietary income)	\$423,848,000	\$668,388,000
Government Revenues:		
State government revenues	\$133,589,000	\$194,825,000
Local government revenues	\$37,397,000	\$59,751,000

Table B-5

Summary of Economic Impact Estimates
Previous Study:
June 2005 through May 2006

FOR REFERENCE ONLY*

	June 2005-May 2006
Estimated Traveler Expenditures (\$ in Millions)	
Total	\$1,665.61
Travelers with Paid Accommodations	
Hotels/Motels/B&Bs	\$751.38
Resorts	\$274.06
Campgrounds	\$180.47
Travelers with No Lodging Expenses	
Visiting Friends/Relatives	\$416.40
Day Trippers	\$43.31
Estimated Travel Volume: Person-Visits (in Millions)	
Total	6.37
Travelers with Paid Accommodations	
Hotels/Motels/B&Bs	2.28
Resorts	1.41
Campgrounds	0.76
Travelers with No Lodging Expenses	
Visiting Friends/Relatives	0.41
Day Trippers	1.51

* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

Note: Columns of figures may not add to totals shown due to rounding.

Note: A person-visit is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 6.365 million person-visits should not necessarily be interpreted as 6.365 million travelers.

Table B-5 (Cont'd)

Summary of Economic Impact Estimates
Previous Study:
June 2005 through May 2006

*FOR REFERENCE ONLY**

	June 2005-May 2006	
	Direct Impact	Total Impact
Employment (full-time job equivalents)	30,300	40,200
Resident Income (wages, salaries, and proprietary income)	\$458,400,000	\$711,200,000
Government Revenues:		
State government revenues	\$140,100,000	\$203,600,000
Local government revenues	\$45,300,000	\$68,200,000

* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

**Appendix C:
Traveler Profile-
Tables of Significant Differences**

STATISTICAL DIFFERENCES

The Profile of Northeast Region Travelers

When appropriate, significant differences at the 95% confidence level are noted in the findings. Tests of significance are statistical methods for measuring the likelihood that observed relationships in a sample are the result of real differences between the groups and not sampling error. Thus, when we state that two numbers are statistically different at the 95% confidence level, we are saying that if we were to sample the universe 100 times, at least 95 times out of 100 the samples observed would be different. In contrast, fewer than five times out of 100 there would not be any difference between the observed numbers.

The following is an example of how these tables can be interpreted and used. The proportion of respondents residing in Minnesota was significantly higher in the fall (67%), winter (73%), and spring (71%) than in the summer (59%).

Table C-1
Demographic and Socioeconomic Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	Base:	June-May Total 655	June- August (Summer) 264	September - November (Fall) 158	December- March (Winter) 114	April - May (Spring) 119
		a	b	c	d	e
Average Age		41.8	42.1d	45.4bde	38.4	39.8
Gender:						
Male		47%	45%	48%	54%b	46%
Female		46	48d	45	39	48
Residence:						
<u>United States</u>		94%	93%	92%	98% bc	96%
Minnesota		66	59	67 b	73b	71b
Wisconsin		6	5	4	9 c	8
Iowa		2	3d	3	1	1
North Dakota		2	3c	1	4c	*
Other state		7	7	10d	5	7
State not specified		11	17cde	7	8	9
Canada		4	4 d	8 bde	1	2
Residence by DMA:						
Minneapolis-St. Paul		48%	46%	48%	54% b	49%
Duluth – Superior		18	12	19 b	21 b	25 b
Other DMAs		13	14 d	15 d	9	12
No Answer		17	23 cde	15	9	13

*Less than 5%.

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category.
 DMAs with responses less than 2% among the total sample have been aggregated into the "Other DMAs" category.

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table C-2
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total Base: 655	June- August (Summer) 264	September - November (Fall) 158	December- March (Winter) 114	April- May (Spring) 119
	a	b	c	d	e
Trip Purpose (multi-response):					
Vacation/short pleasure trip	79	88 cde	70	72	79 c
Personal (e.g., wedding, funeral, medical, etc)	15	9	18 b	25 be	16 b
Business or work	7	5	12 bde	4	6
Travel Party Size:					
1 person	10%	8%	8%	16%bc	10%
2 people	44	42	58 bde	38	35
3 to 4 people	31	33 c	22	31 c	38 c
Average Travel Party Size	2.8	2.9 c	2.6	2.8	3.0 c
Total Trip Length of Stay:					
1 night	16%	14%	16%	27% bce	9%
2 nights	34	25	33 b	40 b	52 bcd
3 to 6 nights	30	40 cde	29 de	18	19
Average Nights (Excluding Daytrippers)	2.9	3.3 de	3.0 d	2.5	2.6
Children in Travel Party					
One or more children under 18	29%	35% cd	16%	26% c	37% cd
No children	71	65	84 bde	74 be	63
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	89%	86%	96%be	94%be	83%
One or more	11	14 cd	4	6	17cd
<i>6 to 11 years old</i>					
None	86%	82%	91% be	90% b	83%
One or more	14	18 cd	9	10	17 c
<i>12 to 17 years old</i>					
None	84%	81%	93% bde	83%	82%
One or more	16	19 c	7	17 c	18 c

*Less than 5%.

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	655	264	158	114	119
	a	b	c	d	e
Minnesota Trips in Last 5 Years					
None	6%	6% d	8% d	2%	6%
1 trip	4	5 cde	2	2	2
Lodging:					
<u>Paid Accommodations</u>	<u>75%</u>	<u>75%</u>	<u>71%</u>	<u>80% c</u>	<u>75%</u>
Hotel/Motel/Historic Inn	54	48	57 b	69 bce	49
Resort	7	5	9 b	6	8
Vacation home/condo/cabin/houseboat you rented	4	3	1	4 c	7bc
In an RV at a campground	6	12ce	2	*	1
In a tent at a campground	5	7cd	*	*	10cd
<u>Unpaid Accommodations</u>					
Home of family or friends	7	5	12b	8	7
Vacation home/condo/cabin/houseboat of family or friend	2	3cde	*	1	*
At your vacation home/condo/cabin/houseboat	2	2d	2	*	2

*Less than 5%.

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	655	264	158	114	119
	a	b	c	d	e
Activities:					
<u>General</u>					
Dining out	70%	69% e	77% be	75% e	60%
Sightseeing or driving for pleasure	45	58cd	37d	12	60cd
Driving on designated scenic byways	32	42cd	30d	8	37d
Taking in city sites	24	36cde	16d	8	23d
Nightlife or evening entertainment	15	15	18e	16e	9
Casino gaming	17	16e	13	37bce	9
Viewing fall colors	8	3	30b	*	*
<u>Shopping (checked one or more below)</u>	<u>49%</u>	<u>58%de</u>	<u>53%d</u>	<u>30%</u>	<u>44%d</u>
For gifts or souvenirs	33	43cd	31d	11	34d
Arts, crafts, or antiques	16	20de	22de	5	11d
General or mall shopping	15	13	25bde	12	9
Outlet shopping	6	7de	9de	2	3
<u>Attending (checked one or more below)</u>	<u>27%</u>	<u>30%e</u>	<u>38%bde</u>	<u>23%e</u>	<u>10%</u>
Fairs or festivals	9	14e	13e	*	4
Amateur sporting events	8	3	20be	13be	2
Professional sporting events	2	1	6bd	2	*
Other events	6	11cde	1	4c	2
<u>Visiting (checked one or more below)</u>	<u>66%</u>	<u>82%cd</u>	<u>60%d</u>	<u>18%</u>	<u>84%cd</u>
State or national parks	33	44cd	24d	3	48cd
Historic sites	24	34cd	19d	3	30cd
Friends or relatives	21	21de	35bde	9	12
Other museums	16	24cd	12d	3	18d
Amusement parks or carnivals	6	8d	6d	2	5
Other attraction	10	11d	11d	2	13d

*Less than 5%.

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	655	264	158	114	119
	a	b	c	d	e
<u>Participating In (checked one or more below)</u>	<u>66%</u>	<u>71%cd</u>	<u>62%</u>	<u>55%</u>	<u>70%d</u>
Hiking	34	44cd	30d	3	47cd
Pool swimming	16	20d	15	9	17d
Fishing	12	16c	10	*	17
Wildlife viewing or bird watching	12	18cd	9d	2	13d
Biking	9	14c	6	*	10
Lake/river swimming	9	18ce	2	*	8c
Canoeing	6	10c	2	*	8c
Downhill skiing or snowboarding	6	*	4	28ce	2
Golfing	5	10ce	2	*	4
Snowmobiling	4	*	6e	14ce	2
Motor boating/water skiing	3	4e	3	*	1
Cross-country skiing	2	*	2	8ce	*
Hunting	2	*	7be	*	2
Ice Fishing	1	*	*	5e	2
Other activity	10	10e	15de	8	4

*Less than 0.5%

Table C-3:
Travel Planning Sources

2007-2008 Only

	<u>June 2007 – May 2008</u>	<u>June- August (Summer)</u>	<u>September- November (Fall)</u>	<u>December- March (Winter)</u>	<u>April- May (Spring)</u>
	a	b	c	d	e
Friends/relatives/co-workers	47%	49% e	51% e	47% e	31%
Internet	43	40	45	37	57bd
Brochure/travel guide	9	12d	9	4	8
Newspaper/magazine	3	5d	2	1	2
TV/radio	2	5d	*	1	*
Other	18	17e	26e	21e	6
No answer	5	6c	1	5	6

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

**Appendix D:
Traveler Profile -
Tables of 2007-2008 Only Results**

TABLES OF 2007-2008 ONLY RESULTS

The Following section includes the Traveler Profile Study results from the data collected during June 2007 through May 2008.

Table D-1
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Age:					
18 to 24	14%	11%	7%	32%	13%
25 to 29	10	10	12	9	9
30 to 39	17	16	17	10	26
40 to 49	19	22	12	15	25
50 to 59	22	23	22	22	18
60 to 64	8	5	15	7	3
65 and older	8	7	13	6	3
No Answer	3	5	1	1	1
Average Age	43.1	43.7	47.2	38.9	40.1
Income:					
Less than \$25,000	8%	5%	11%	11%	7%
\$25,000 - \$34,999	9	7	12	7	10
\$35,000 - \$49,999	19	22	9	23	21
\$50,000 - \$74,999	20	20	21	14	26
\$75,000 - \$99,999	13	15	7	15	17
\$100,000 - \$124,999	11	10	13	12	5
\$125,000 - \$149,999	4	4	2	7	1
\$150,000 or more	6	7	5	6	6
No Answer	11	9	20	6	7
Estimated Median Income	\$61,000	\$62,500	\$60,000	\$62,500	\$58,300
Gender:					
Female	48%	48%	49%	46%	48%
Male	42	40	40	49	38
No Answer	11	12	11	5	14
Racial/Ethnic Background:					
White	90%	80%	94%	91%	85%
American Indian	2	3	1	2	2
Asian	2	2	1	2	2
Black	2	2	1	*	5
Hispanic	1	1	1	2	1
Other	2	1	2	2	2
No Answer	4	5	1	2	6

*Less than 0.5%

Table D-1 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Residence:					
<u>United States</u>	<u>90%</u>	<u>87%</u>	<u>83%</u>	<u>98%</u>	<u>99%</u>
Minnesota	59	49	56	74	72
Wisconsin	7	5	5	11	10
North Dakota	3	4	1	2	*
Iowa	2	3	4	*	1
Other State	9	6	17	7	8
State not specified	10	20	*	4	7
Canada	7	7	17	2	1
Another Country	*	1	*	*	*
No Answer	2	5	*	*	*
Residence by DMA:					
Minneapolis-St. Paul	42%	40%	43%	49%	38%
Duluth-Superior	18	9	12	27	38
Fargo-Valley-City	3	5	1	3	*
La Crosse-Eau Claire	2	2	1	4	1
Other DMAs	15	11	26	11	15
No answer	20	33	17	6	8

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category. DMAs with responses less than 2% among the total sample have been aggregated into the "Other DMAs" category.

Table D-2
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008 Base: 299	June- August (Summer) 124	September- November (Fall) 72	December- March (Winter) 57	April- May (Spring) 45
Trip Purpose (multi-response):					
Vacation/short pleasure trip	85%	92%	87%	71%	79%
Personal (e.g., wedding, funeral, Medical, etc)	13%	4%	12%	28%	17%
Business / work	5	6	4	6	3
Convention / conference	2	2	1	2	2
No Answer	1	*	2	*	2
Travel Party Size:					
1 person	9%	9%	7%	13%	5%
2 people	51	45	71	44	48
3 to 4 people	26	29	12	29	36
5 or more	14	17	10	14	11
Average Travel Party Size	2.7	2.9	2.4	2.7	2.8
Total Trip Length of Stay:					
1 night	18%	14%	16%	35%	14%
2 nights	37	28	40	36	56
3 to 6 nights	32	49	27	17	15
7 or more	7	8	10	8	1
Average Nights (Excluding Daytrippers)	3.0	3.4	3.2	2.6	2.2
Children in Travel Party					
One or more children under 18	23%	27%	7%	21%	38%
No children	77	73	93	79	62
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	91%	89%	96%	91%	87%
One or more	9	11	4	9	13
<i>6 to 11 years old</i>					
None	87%	84%	95%	90%	77%
One or more	13	16	5	10	23
<i>12 to 17 years old</i>					
None	88%	86%	98%	88%	80%
One or more	12	14	2	12	20

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008	June- August (<u>Summer</u>)	September- November (<u>Fall</u>)	December- March (<u>Winter</u>)	April- May (<u>Spring</u>)
Base:	299	124	72	57	45
Minnesota Trips in Last 5 Years					
None	5%	3%	10%	2%	7%
1	3	3	5	2	1
2 to 4	26	24	30	15	38
5 to 10	29	26	32	29	32
More than 10	36	44	21	50	21
No answer	1	1	2	*	1
Estimated Median Trips	7.6	8.8	5.4	10.2	5.3
Lodging:					
<u>Paid Accommodations</u>	<u>82%</u>	<u>86%</u>	<u>74%</u>	<u>82%</u>	<u>83%</u>
Hotel/Motel/Historic Inn	58	55	55	69	60
Resort	8	3	18b	5	7
In an RV at a campground	8	20	*	*	*
In a tent at a campground	5	8	*	*	9
Vacation home/condo/cabin/houseboat you rented	3	1	1	7	7
<u>Unpaid Accommodations</u>	<u>13%</u>	<u>13%</u>	<u>18%</u>	<u>14%</u>	<u>3%</u>
Home of family or friends	9	4	17	13	1
Vacation home/condo/cabin/ houseboat you rented	2	5	*	*	1
At your vacation home/condo/cabin/ houseboat	2	3	1	1	1
At a campground with no fee	*	1	*	*	*

*Less than 5%.

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Activities:					
<u>General (checked one or more below)</u>	<u>92%</u>	<u>92%</u>	<u>95%</u>	<u>93%</u>	<u>86%</u>
Dining out	75	70	85	85	59
Sightseeing or driving for pleasure	45	52	54	11	55
Driving on designated scenic byways	31	40	44	5	17
Casino gaming	22	23	12	37	14
Taking in city sites	20	33	17	7	5
Viewing fall colors	14	4	49	*	*
Nightlife or evening entertainment	13	19	12	13	1
<u>Shopping (checked one or more below)</u>	<u>53%</u>	<u>64%</u>	<u>65%</u>	<u>33%</u>	<u>26%</u>
For gifts or souvenirs	34	46	43	7	24
Arts, crafts, or antiques	21	27	32	7	6
General or mall shopping	17	16	29	16	1
Outlet shopping	6	6	11	2	1
At the Mall of America	3	2	7	1	*
<u>Attending (checked one or more below)</u>	<u>31%</u>	<u>45%</u>	<u>34%</u>	<u>16%</u>	<u>3%</u>
Fairs or festivals	11	21	9	*	*
Popular music concerts/shows	4	7	1	2	*
Amateur sporting events	7	2	22b	6	*
Classical music concerts	1	2	*	*	*
Theater performances	1	2	1	*	1
Popular music concerts/shows	4	7	1	2	*
Other events	11	22	1	8	2
<u>Visiting (checked one or more below)</u>	<u>67%</u>	<u>79%</u>	<u>73%</u>	<u>20%</u>	<u>80%</u>
State or national parks	34	46	38	2	39
Friends or relatives	20	20	40	8	6
Historic sites	18	24	27	3	9
Other museums	10	13	12	2	6
Art museums	9	13	16	*	*
Amusement parks or carnivals	5	6	10	3	*
Indian areas	5	5	9	3	1
Indoor water parks	4	3	7	*	5
Outdoor water parks	2	1	7	*	*
Other attraction	19	21	22	2	28

*Less than 0.5%

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Participating In (checked one or more below):	72%	81%	77%	54%	59%
Hiking	38	47	48	4	41
Fishing	17	24	13	*	26
Pool swimming	13	18	9	4	17
Wildlife viewing or bird watching	13	18	15	3	11
Lake/river swimming	12	23	1	*	17
Biking	10	16	9	*	7
Canoeing	7	13	1	*	9
Golfing	7	14	*	*	5
Downhill skiing or snowboarding	5	*	1	25	1
Downhill skiing / snowboarding	5	*	1	25	1
Motor boating/water skiing	4	7	2	*	1
Hunting	2	1	9	*	*
Snowmobiling	2	*	*	8	*
Off-road ATV driving	1	2	*	*	*
Jet skiing	1	2	*	*	*
Cross-country skiing	1	*	1	5	1
Ice fishing	1	*	*	4	*
Other activity	18	17	30	15	2

*Less than 5%.

Table D-3:
Travel Planning Sources

2007-2008 Only

	June 2007 – May 2008	June-August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	299	124	72	57	45
Friends/relatives/co-workers	47%	49%	51%	47%	31%
Internet	43	40	45	37	57
Brochure/travel guide	9	12	9	4	8
Newspaper/magazine	3	5	2	1	2
Newspaper/magazine	3	5	2	1	2
Local tourism bureau	2	3	1	1	3
State Travel Office	2	3	1	*	3
TV/radio	2	5	*	1	*
Visitor/welcome center	2	4	*	*	3
Airline/travel agency	1	*	2	1	5
Other	18	17	26	21	6

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

Appendix E:

Minnesota Tourism Regions

MINNESOTA TOURISM REGIONS

COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

<u>Twin Cities Northeast</u>	<u>Northeast</u>	<u>Northcentral/West</u>	<u>Southern</u>
Anoka	Aitkin	Becker	Big Stone
Carver	Carlton	Beltrami	Blue Earth
Chisago	Cook	Benton	Brown
Dakota	Isanti	Cass	Chippewa
Hennepin	Itasca	Clay	Cottonwood
Ramsey	Kanabec	Clearwater	Dodge
Scott	Koochiching	Crow Wing	Faribault
Washington	Lake	Douglas	Fillmore
Wright	Pine	Grant	Freeborn
	St. Louis	Hubbard	Goodhue
		Kittson	Houston
		Lake of Woods	Jackson
		Mahnomen	Kandiyohi
		Marshall	Lac qui Parle
		Mille Lacs	Le Sueur
		Morrison	Lincoln
		Norman	Lyon
		Otter Tail	McLeod
		Pennington	Martin
		Polk	Meeker
		Pope	Mower
		Red Lake	Murray
		Roseau	Nicollet
		Sherburne	Nobles
		Stearns	Olmsted
		Stevens	Pipestone
		Todd	Redwood
		Wadena	Renville
		Wilkin	Rice
			Rock
			Sibley
			Steele
			Swift
			Traverse
			Wabasha
			Waseca
			Watsonwan
			Winona
			Yellow Medicine

Appendix F:

Survey Instruments

Minnesota 2007/2008 Lodging Managers Survey – Wave 1 (June –August 2007)

Date: _____ Date: _____ Date: _____ Date: _____ Date: _____ Date: _____
 Time: _____ Time: _____ Time: _____ Time: _____ Time: _____ Time: _____
 Status: _____ Status: _____ Status: _____ Status: _____ Status: _____ Status: _____
 Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____

Interviewer: Verify basic information with the person who answers the phone.

Phone Number: «phone» Alternate: «altphone» Contact Name: «manager» Title: «title» Property Name: «name» Fax Number: «fax» Physical Address: «add1» «add2» «city», MN «zip» Mailing Address: «madd1» «madd2» «mcity», «mstate» «mzip» Rooms: «size» («ptype»)	All information correct <input type="checkbox"/>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------

Interviewer: Ask to speak with «manager». If not available after multiple attempts, interview an alternate executive and record name/title below.

Contact Name: _____ Title: _____

- Is your property open only to members of special groups (club members, boy/girl scouts, church groups, etc.)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property available only for permanent or semi-permanent rentals (bookings of more than thirty days at a time)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property open all year? Yes ☐ -- Go to Q4 No ☐ -- Go to Q3A

3A. *If No* – When does your property open for the season? _____ «season_open»

When does your property close for the season? _____ «season_close»

For each month open -- How many nights is your property open for that month?

Jan	«jan»		Feb	«feb»		Mar	«mar»		Apr	«apr»		May	«may»		Jun	«jun»	
Jul	«jul»		Aug	«aug»		Sep	«sep»		Oct	«oct»		Nov	«nov»		Dec	«dec»	

No nights for **June through August** ☐ -- Terminate for this quarter.

- For the purpose of this study, please think of long term rentals as 30 nights or more. Of the rooms you have for rent, were any committed to long-term rentals, or were any otherwise not available for rental for the period **June 1, 2007 to August 31, 2007**?

Yes ☐ -- Go to Q4A No ☐ -- Go to Q5

- If Yes* -- As I read each month, please tell me how many of your total rooms were available to transient guests staying for less than 30 nights.

Jun		Jul		Aug	
-----	--	-----	--	-----	--

- What was your **average percent occupancy rate** for each of the following months?

Jun	%
Jul	%
Aug	%

(If not able to provide occupancy by month

OR **Seasonal Average** _____ %

Don't know/ ☐ -- Go to Q6
 unavailable

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qr1»	Q2: «qr2»	Q3: «qr3»	Q4: «qr4»	Status: «status»
--------------	--------------	------------------	-----------	-----------	-----------	-----------	------------------

Minnesota 2007/2008 Lodging Managers Survey – Wave 1 (June –August 2007)

6. What was your **average daily unit rate** for each of the following months?

*Interviewer: If the lodging manager is unable to provide the average daily rates please use the space provided in the column "other details" to record specific unit rate information for each month. (For example, number of **rooms** at each of several different rates, weekend vs. weekday rates, etc.)*

	ADR	Other Details
Jun	\$	
Jul	\$	
Aug	\$	

Only use if the manager is not able to provide ADR by month.

Seasonal ADR	
--------------	--

Office Use Only: Estimated ADR: June	July	August
Estimated Seasonal ADR: _____		

For the next few questions, please think only of guests who are staying for less than 30 nights.

7. On average, how many nights did a typical guest stay in your property between **June 1, 2007 and August 31, 2007**?

Average # of nights	
---------------------	--

8. What was the average number of guests staying in one room during the **June 1, 2007 to August 31, 2007** time period?

Average Party Size	
--------------------	--

9. During the period **June 1, 2007 to August 31, 2007**, what percentage of your room-nights were rented to guests traveling for...

Pleasure/Personal:	%
Business:	%
Meetings/conventions:	%

10. Between **June 1, 2007 and August 31, 2007**, what percentage of your guests were from...

Minnesota	%
Other US locations	%
Canada	%
Other international locations	%

Comments:

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qt r1»	Q2: «q tr2»	Status: «status»	Q3: «qt r3»	Q4: «qt r4»
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Quarterly Resident Survey -- Minnesota Tourism Study

Speak to Head of Household:

Hello, I'm _____ from *Davidson-Peterson Associates*, a marketing research firm specializing in Travel & Tourism. We are talking to people in your area to learn more about vacation trips associated with visiting friends and family for Explore Minnesota and the State of Minnesota.

May I speak with the male or female head of household?

(IF TRANSFERRED TO ANOTHER ADULT, REPEAT INTRODUCTION. IF CONTINUING WITH THE SAME INDIVIDUAL WHO ANSWERED THE TELEPHONE, CONTINUE BELOW.)

May I ask you a few quick questions? This is not a sales call and your individual responses will remain strictly confidential. It should take only 3 or 4 minutes of your time.

First, is this your primary residence, meaning you spend a majority of your time living at this address?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

Are you eighteen years or older?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

1. Now, by visiting friends and relatives, we mean those people whose visit is considered non-routine -- please do not include routine visits by the same people, such as college students home for vacation. We're interested in those people who are on a vacation or non-routine trip.

Over the 3 month period of June 2007 through August 2007, on how many occasions did you have friends or relatives stay overnight in your home for at least one night on non-routine visits?

Number of occasions: _____

None ☐

Skip to Q.5

For Each Occasion:

2. Think about the **last** time you had friends or relatives visit. In what month was that?
(Record Below)

3. How many people stayed with you on that occasion? **(Record Below)**

4. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

	Q.2 Month	Q3. # of People	Q4. # of Nights
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 5.

Average # of people:_____ Average # of nights:_____

Second Home Section

5. Do you own a second home used for recreational purposes somewhere else in Minnesota?

Yes [☐]

No [☐]

Skip to Q.13

6. In which county is your **second** home located? _____

7. Over the 3 month period of June 2007 through August 2007, on how many occasions did you visit your second home for at least one night?

Number of occasions: _____ None [] **Skip to Q.13**

For Each Occasion:

8. Think about the **last** time you visited your second home. In what month was that? **(Record Below)**

9. Including yourself, how many people in your immediate family visited on that occasion? **(Record Below)**

10. And, how many nights did you stay? **(Record Below)**

11. How many people **other than your immediate family** stayed with you on that occasion? **(Record Below)**

12. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

	Q.8 Month	Q.9 # of Family Members	Q.10 # of Nights	Q.11 # of Guests	Q.12 # of Nights
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 12.

Average # of **Family**: _____ Average # of **Guests**: _____

Average # of Nights: _____ Average # of Nights: _____

13. In total, including yourself, how many people live in your household?

of people: _____

14. What is the ZIP code of your home address?

15. In which county is your home located? _____

Respondent Name: _____

Record Gender: Male []-1 Female []-2

Phone number: _____

Thanks for taking the time to complete this survey. Your information is greatly appreciated. For verification purposes, you might be contacted in the future to go over the information you provided today. Once again, thanks.



DPA Use Only

Dear Traveler:

Your visit to our area is very important to us. Please take a few moments to answer the following questions and return this questionnaire to the person who gave it to you. Your responses are very important. Please make your marks **INSIDE** the boxes or circles. Thank you very much.

1. What is your reason or reasons for visiting this area? *(Please mark all that apply.)*

- ☐ ₁ Vacation/short pleasure trip
- ☐ ₃ Convention/conference
- ☐ ₂ Personal (wedding, funeral, medical, etc.)
- ☐ ₄ Business/work

2. What source(s) of information did you use in planning your trip? *(Please mark all that apply.)*

- ☐ ₁ Internet
- ☐ ₄ Brochure/travel guide
- ☐ ₇ Friends/relatives/co-workers
- ☐ ₁₀ Other (specify):
- ☐ ₂ Newspaper/magazine
- ☐ ₅ TV/radio
- ☐ ₈ Local tourism bureau
-
- ☐ ₃ State Travel Office
- ☐ ₆ Airline/travel agency
- ☐ ₉ Visitor/welcome center

3. **While on this trip**, which of the following activities will members of your travel party participate in? *(Please mark all that apply.)*

General:

- ☐ ₁ Casino gaming
- ☐ ₂ Dining out
- ☐ ₃ Driving on designated scenic byways
- ☐ ₄ Nightlife/evening entertainment
- ☐ ₅ Sightseeing/driving for pleasure
- ☐ ₆ Taking in city sites
- ☐ ₇ Viewing fall colors

Attending:

- ☐ ₈ Classical music concerts
- ☐ ₉ Fairs or festivals
- ☐ ₁₀ Popular music concerts/shows
- ☐ ₁₁ Professional sporting events
- ☐ ₁₂ Amateur sporting events
- ☐ ₁₃ Theater performances
- ☐ ₁₄ Other events

Participating in:

- ☐ ₁₅ Biking
- ☐ ₁₆ Canoeing
- ☐ ₁₇ Golfing
- ☐ ₁₈ Fishing
- ☐ ₁₉ Hiking
- ☐ ₂₀ Motor boating/water skiing
- ☐ ₂₁ Off-road ATV driving
- ☐ ₂₂ Pool swimming
- ☐ ₂₃ Lake/river swimming
- ☐ ₂₄ Jet skiing
- ☐ ₂₅ Wildlife viewing/bird watching
- ☐ ₂₆ Hunting
- ☐ ₂₇ Cross-country skiing
- ☐ ₂₈ Downhill skiing/snowboarding
- ☐ ₂₉ Ice fishing
- ☐ ₃₀ Snowmobiling
- ☐ ₃₁ Other activity

Visiting:

- ☐ ₃₂ Amusement parks/carnivals
- ☐ ₃₃ Art museums
- ☐ ₃₄ Other museums
- ☐ ₃₅ Friends or relatives
- ☐ ₃₆ Historic sites
- ☐ ₃₇ Indian areas
- ☐ ₃₈ Indoor water parks
- ☐ ₃₉ Outdoor water parks
- ☐ ₄₀ State/national parks
- ☐ ₄₁ Other attraction

Shopping:

- ☐ ₄₂ For gifts or souvenirs
- ☐ ₄₃ Outlet shopping
- ☐ ₄₄ Arts, crafts, antiques
- ☐ ₄₅ At the Mall of America
- ☐ ₄₆ General/mall shopping

4. How many nights **in total** do you intend to stay in either this town or city or the immediate surrounding area on this trip? *(Please write in the boxes provided.)*

of Nights in total:

5. How many nights have you already spent in this area on this trip? *(Please write in the boxes provided.)*

of Nights already spent:

6. Are you staying overnight (either last night or tonight)...

In paid accommodations:

- ☐ ₁ At a hotel/motel/historic inn
- ☐ ₂ At a Bed and Breakfast
- ☐ ₃ At a vacation home/condo/cabin/houseboat you rented
- ☐ ₄ At a resort (cabin/other indoor unit)
- ☐ ₅ In an RV at a campground
- ☐ ₆ In a tent at a campground

In accommodations with no charge:

- ☐ ₇ At the home of family or friend
- ☐ ₈ At vacation home/condo/cabin/houseboat of a family or friend
- ☐ ₉ At your vacation home/condo/cabin/houseboat
- ☐ ₁₀ At a campground with no fee

7. **Not** including this trip, how many times in the **last 5 years** have you taken a pleasure trip in Minnesota?
- ☐ None

☐ 1

☐ 2 to 4

☐ 5 to 10

☐ More than 10
8. Including yourself, how many people are in your immediate travel party? *(Please do **not** include your entire group if traveling on an escorted group tour, on business, or attending a convention/conference.)*
- # in Immediate Travel Party:
9. How many of those people are...
- Younger than 6 yrs old

6-11 yrs old

12-17 yrs old

Adults
10. Please tell us the amount **you and your immediate travel party** spent during **the past 24 hours in this area** in each of the following categories listed below. A few examples for each category are provided. If you have just arrived in this area, please estimate your expenses for the next 24 hours.

Spending Category	Amount Spent
a. Lodging and Camping Accommodations (Fee FOR ONE NIGHT) <i>If you have not paid yet, estimate one night's cost.</i>	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
b. Food and Beverages (meals, snacks, groceries, beer/wine/liquor "by the drink")	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
c. Liquor Purchases (beer/wine/liquor "by the bottle")	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
d. Sport Fees (outfitters, guides, gear rentals, greens fees, lift tickets)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
e. Events Admissions (sporting events, popular concerts, festivals)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
f. Cultural Performance Admissions (tickets for theater, opera, classical concerts, dance)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
g. Other Evening Entertainment (movies, clubs, lounges, etc.)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
h. Historic/Cultural Site Admissions (historic homes, sites, museums, exhibitions)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
i. Other Sightseeing/Attractions (tours, admissions)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
j. Shopping - Tourist (gifts, souvenirs, antiques, arts and crafts)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
k. Shopping - General (clothing, personal or household items)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
l. Ground Transportation (gasoline, parking, local bus, taxi, car rentals)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
m. Lottery Tickets (scratch-off tickets, Powerball, etc.)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
n. Gaming (gambling and legal betting activity)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
o. Licenses/Registrations/Permits (fishing, hunting, ATV, snowmobile, trail pass)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
p. All other, please explain: <div></div>	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>

Now, a few questions for classification purposes only:

11. What is your age, please?
-
12. What is your total annual household income before taxes?
- ☐ ₁ Less than \$25,000

☐ ₃ \$35,000 – \$49,999

☐ ₅ \$75,000 – \$99,999

☐ ₇ \$125,000 – \$149,999

☐ ₂ \$25,000 – \$34,999

☐ ₄ \$50,000 – \$74,999

☐ ₆ \$100,000 – \$124,999

☐ ₈ \$150,000 or more
13. Are you:
- ☐ ₁ Male

☐ ₂ Female
14. Are you: *(Please mark all that apply.)*
- ☐ ₁ American Indian

☐ ₂ Asian

☐ ₃ Black

☐ ₄ Hispanic

☐ ₅ White

☐ ₆ Other
15. Are you currently a resident of:
- ☐ ₁ United States

☐ ₂ Canada

☐ ₃ Another country
- Current Home Zip Code:

For validation purposes only, we will randomly contact participants to verify their answers. Results will not identify you with your answers and all answers will be reported in total. Your personal information will never be sold or used for marketing. Please provide us with the following information.

Name: Phone Number: ()